

# Los Alamos National Laboratory — Supplemental Instructions

**Section: 7 Acquisition Planning**

**Subject: 7.1 Acquisition Planning — General**

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**PURPOSE:** This Supplemental Instruction (SI) defines LANL's responsibilities in performing acquisition planning.

**POLICY:** The Laboratory will perform acquisition planning in order to obtain quality products in a timely manner at a reasonable price. Depending upon the anticipated dollar value and complexity of the requirement, acquisition plans will address such issues as identification of acquisition requirements, funding, make-or-buy decisions, scheduling, key program/Procurement personnel, market research, public notifications, competition, socioeconomic considerations, source selection, award, delivery, and possible follow-on subcontracts.

**SCOPE:** Acquisition planning is required for planned subcontracts anticipated to exceed \$500,000 or for those that warrant special attention.

**Exceptions** Acquisition plans are not required for ADP acquisitions requiring DOE Order 1360 Acquisition or Implementation Plans, [leases of real property](#), releases against GSA contracts, local vendor agreements (LVAs), or orders to DOE M&O contractors.

## **DEFINITIONS:**

### **Detailed Acquisition Plan**

A detailed acquisition plan is a plan that addresses all of the essential business decisions necessary to coordinate and integrate efforts to subcontract for goods or services in a timely manner and at a reasonable cost. A detailed acquisition plan is prepared for proposed acquisitions exceeding \$500,000 as part of the presolicitation process.

### **Project Proposal**

A project proposal is a proposal submitted by the Laboratory to a sponsor to obtain approval and funding to perform research or other support.

### **Summary Acquisition Plan**

A summary acquisition plan is a brief plan that summarizes the planned acquisition. A summary plan includes the description, cost, and schedule information. It is normally included in project proposals to ensure that acquisition constraints are identified and considered. Usually, the summary acquisition plan precedes development of the detailed acquisition plan.

### **Identifying Requirements**

The necessity for an acquisition plan is often identified by Laboratory program personnel and BUS-5/8 team leaders or staff during the development of a project proposal. Proposals that anticipate the need for a subcontract that will exceed \$500,000 or one that requires special attention, such as equipment purchases that are critical to a large program, should

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## **PROCEDURES: (cont)**

have a summary acquisition plan prepared at the time that the project proposal is submitted to the sponsor. The summary acquisition plan should include the following information:

- A description of the goods or services;
- The estimated acquisition cost;
- The estimated acquisition lead-time (i.e., from the time of submission of the PR to BUS through award of the subcontract); and
- The estimated total acquisition time (i.e., from the time of submission of the purchase request (PR) to BUS to completion of the services or delivery of the goods).

Each Business Team Leader (BTL) must keep a list of known requirements that have or will need an acquisition plan. A current version of the list must be provided to the Procurement Manager by the 10th work day following the end of each fiscal quarter.

## **Detailed Acquisition Plan**

When it appears likely that the acquisition will take place, a detailed acquisition plan must be prepared jointly by the requester and the procurement specialist. Decisions made during preparation of an acquisition plan will assist the requester in preparing the PR, statement of work and/or specifications, source list or sole-source justification, evaluation criteria, and other elements of the PR package. The detailed acquisition plan should follow the format shown in SI Exhibit 7.1a, Sample Detailed Acquisition Plan. If an element does not apply, the detailed acquisition plan should state why it does not.

## **RESPONSIBILITIES:**

### **Procurement Specialist**

The procurement specialist will jointly prepare a detailed acquisition plan with the requester.

### **Business Team Leader**

The Business Team Leader will

- Maintain a list of known requirements that have or will need an acquisition plan and
- Provide a current version of the list will to the Procurement Manager by the 10th work day following each fiscal quarter.

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